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SPANISH MOROCCO
and
THE TANGIER ZONE

Vol. II

Economic Resources

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1. DEFICIENCIES AND SURPLUSES

Spanish Morocco, for this purpose, includes the Tangier Zone and the Presidios. The principal deficiencies of the area are certain food products, such as flour, sugar, and vegetable oils other than olive oil, textiles, fuel products, cement, fertilizers and almost all kinds of metal manufactures. The principal surpluses of the area are iron ore, limestone and phosphate rock, and antimony ore.

The net positions for 1934, as shown in Table I, require some qualification for later years. Due to a development of market gardening and orange production, net imports of potatoes, other vegetables, and fruit have probably declined. Livestock, on the other hand, probably is no longer a net export. Exports of antimony ore have declined considerably; present total production is estimated to be about a third of total exports in 1934. Small amounts of zinc, copper, manganese, lead, and graphite, not shown in the table, have at various times been exported.

The area is chiefly supplied by, and exports to, European and overseas countries. Trade connections with other African areas are relatively small to the extent that they have been measured statistically. No doubt some

TABLE I

Spanish Morocco: Net Trade Position, 1934

Including Tangiers Zone and the Presidios

(metric tons)

Commodities	Imports	Exports	Net Imports	Net Exports
Animals & Animal Products				
Cattle, goats (swine) & sheep (heads)	6,113	13,342		7,229
Poultry (heads)		32,000		32,000
Eggs		1,396		1,396
Fish, fresh and salted		1,809		1,809
Other animal products	753	1,723		970
Vegetables & Vegetable Products				
Grains and flour	50,697	3,153	47,544	
Potatoes	17,712		17,712	
Other vegetables	12,425	4,247	8,178	
Fruit	4,556	378	4,178	
Sugar	19,578		19,578	
Alcoholic Beverages	4,409		4,409	
Tobacco	436		436	
Olive oil	3,146		3,146	
Other vegetable oils	1,492		1,482	
Other foodstuffs	21,172	5,000	16,172	
Cotton and cotton manufactures	2,802		2,802	

TABLE I (continued)

Commodities	Imports	Exports	Net Imports	Net Exports
Vegetables & Veg. Products (cont'd.)				
Other textiles	245	73	172	
Wood and Wood Manufactures	8,442	3,257	5,185	
Paper and paper products	1,539	40	1,499	
Fibers	1,000	5,816		4,816
Esparto grass and products		3,900		3,900
Straw	1,800	1,300	500	
Minerals and Mineral Products				
Coal and coke	42,286	8,358	33,928	
Petroleum and Petroleum products	44,990	8,252	36,738	
Iron ore		817,138		817,138
Metals and metal manufactures	9,015	2,750	6,265	
Other mineral products	3,983	1,181	2,802	
Machinery	316		316	
Automobiles and parts	808		808	
Antimony sulphide		802		802
Cement	43,286		43,286	
Stone and brick		88,772		88,772
Tiles and cornices	665		665	
Chalk		1,804		1,804

TABLE I (continued)

Commodities	Imports	Exports	Net Imports	Net Exports
Chemicals and chemical products	5,707	98	5,609	
Soap	1,793		1,793	
Candles	695		695	

Sources: Statistiques du Mouvement Commercial et Maritime du Maroc, 1935.
Estadistica del Commercio Esterior de Espana, 1935.

barter is carried on across the border of French Morocco. Since the late nineteen-thirties, there has been a decided shift towards increased trade with Spain.

2.- IMPORTS INTO THE SPANISH ZONE THROUGH CEUTA AND MELILLA.

According to 1934-35 data about 15 to 20 percent of the total annual imports (weight) unloaded in Ceuta and about 25 percent (weight) of the annual imports unloaded in Melilla passed on into the interior. Both ports taken together handled about two-thirds of the total imports into Spanish Morocco. Total cargo tonnage imported into Spanish Morocco amounted to about the same in 1938 as in 1934-35, so that the above proportions may be taken as typical under normal conditions.

The table below shows the quantities cleared through the customs ports of the Spanish zone in 1935.

Imports Cleared through Customs Posts
of the Spanish Zone in 1935. 1/
(Metric Tons)

Arzila	911
Beni Enzar (Melilla)	39,129
Castillejos (Ceuta)	28,940
Ceuta	12,468
Larache	27,518
Rio Martin (Tetuan)	6,434
Tetuan	4,815
Alhucemas	6,226

1/ Report on Economic and Commercial Conditions in Morocco; Department of Overseas Trade, No. 731, May 1939, London.

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Since the ratios and figures given above do not include imports by sea of products used for domestic consumption of Ceuta and Melilla, they do not show the relative importance of the ports for total imports by sea of the area.

3. TRADE BETWEEN CEUTA, MELILLA, AND THE THREE ZONES OF MOROCCO

The trade, excluding transit movements, between the ports of Ceuta and Melilla on the one hand and the zones of Morocco on the other, is extremely small in comparison to the total trade of these ports.

The table below shows the relative insignificance of the internal movements in 1934.

Trade Between Ceuta, Melilla

and the Three Zones of Morocco

Exports 1934
Rounded figures
Thousands of dollars*

	Ceuta		Melilla	
	Value	Per cent	Value	Per cent
Total	1,320	100.0	3,390	100.0
To Spanish Morocco	50	3.7	300	8.8
To French Morocco	30	2.3	60	1.8
To Tangiers	30	2.3	7	.2

Imports 1934
Rounded figures
Thousands of dollars*

	Ceuta		Melilla	
	Value	Per cent	Value	Per cent
Total	5,670	100.0	10,170	100.0
From Spanish Morocco	30	.5	10	.1
From French Morocco	170	3.0	370	3.6
From Tangiers	30	.5	40	.4

* 1 dollar = approx. 3 pesetas

Source: Estadistica del Comercio Exterior de Espana, 1935.

The table below summarizes the internal movements between Ceuta and Melilla on the one hand, and French and Spanish Morocco on the other.

Ceuta and Melilla: Trade with Spanish and French Morocco, 1934

Rounded figures
Thousands of dollars*

	Imports			Exports		
	Total	From Spanish Morocco	From French Morocco	Total	To Spanish Morocco	To French Morocco
Value	15,840	40	540	4,710	350	90
%	100	.3	3.4	100	7.4	1.9

* 1 dollar = approx. 3 pesetas.

Source: Estadistica del Comercio Exterior de Espana, 1935.

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AGRICULTURE

Grains
Vegetable Oils
Fruits and Vines
Vegetables
Miscellaneous Foods
Livestock
Fisheries
Forests
Textiles

Prepared by
Agriculture and Standard of Living Section
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SUMMARY

The Spanish Zone of Morocco and the International Zone of Tangier are not rich agricultural lands. The standard of living of the natives is low. For the most part the rural areas are self-sufficient as regards food. But to meet part of the demands of the cities, considerable imports of food have been necessary. The chief sources of supply were the French Zone in Morocco and Spain. Since the Spanish Civil War, however, the resources of that country have been so depleted and its transportation facilities so reduced that it has been impossible to move any but the smallest quantities of food out of the country. Moreover, in the past few years, the French have placed restrictions on the export of foods from their territory in Morocco. There has been some smuggling over the border, as higher prices in the Spanish Zone made this a profitable venture. Nevertheless, the food situation in both Tangier and Spanish Morocco has become increasingly tight.

Minimum monthly requirements of food for Tangier are given below[1]. Similar data do not exist for the Spanish Zone, but none of the cities there is the equal of Tangier in size. Moreover, most of these cities have a larger hinterland upon which to draw. That the situation there, however, was not a comfortable one may be judged from a report that a considerable part of the limited imports into Tangier in the last year had been drawn off into Spanish Morocco where the need was greater.

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[1] American Consulate at Tangier, October 6, 1941. Report #376.

Minimum monthly food requirements (in tons) for civil purposes in Tangier:

Flour	1,000
Grain	330
Sugar	250
Potatoes	125
Dried vegetables	80
Tea	60
Soap	60
Beans	50
Bran	50
Rice	30
Semolina	30
Coffee	25
Margarine	15
Candles	10
Fresh fruit, olives, nuts	10

In addition to these commodities, there are monthly imports of 300 cases of eggs, 300 cases of condensed milk, 6,000 chickens, 800 sheep, 770 cattle, and 25 pigs. Spanish Morocco has adequate supplies of fruits and most fresh vegetables, but domestic production of vegetable oils is insufficient. Under normal circumstances, fish are abundant; now lack of fuel has limited the activities of fishing boats.

With respect to clothing, the situation is no better than for foods. Clothes, cotton goods, and even thread are very scarce. Some relief has been afforded by small shipments from the United States. While there is a good forest cover, it has been little exploited, except for some cork, firewood and charcoal.

GRAINS

The western half of Spanish Morocco is good agricultural country; water is abundant throughout the year and the soils are good. The richest producing areas indicated on the map are the plains of the Oued Loukkos and the Rio Martin, the district between Tetuan and Xauen, and the Ouergha valley. The eastern part of the country is poorer, and in general, with the exception of some self-supporting villages in the Rif Mountains, grain production fails to meet the needs of the country. There are marked year-to-year variations in yields as the result of climatic variations. The regional distribution of cereal area and production is shown on Table I. Table II shows production of grains by regions for a series of years.

Barley is the main native food crop and occupies over half of the cultivated land. This proportion rises in the Eastern Region where soils are in general less fertile and the more hardy barley is preferred to wheat. Wheat, mostly of the hard type, is grown chiefly in the western half of the country, nearly half of the total area under wheat being in the Western Region. Soft wheat is grown only by a few of the European colonists.

Corn is relatively unimportant as it is unsuited to the climate and the soil. European colonists, particularly in Yebala and Gomara are almost the sole growers of this crop. Sorghum, a characteristic crop in regions where a low standard of living prevails, is a staple of native diet in the Western part of Spanish Morocco. Oddly enough, although it is especially suited to a dry climate, little sorghum is grown in the eastern part of the country. In past years, the area under sorghum has shown a tendency to decrease. Yields, however, are better than for other cereals so that production has actually increased.

Data on imports of the most important cereals are shown on Table III. The sources of supply, in normal times, were chiefly Spain and French Morocco. Imports from these countries have been cut drastically as a result of the war so that shortages have made their appearance. In the early months of 1941, it was reported[1] that by the end of the summer wheat flour was practically unobtainable. When small shipments of wheat flour did arrive at Tangier, the major part was drawn off to the Spanish Zone where the need was greater. The situation in this latter area improved somewhat in the course of the year as the result of trade agreements under which certain supplies were made available from French Morocco. In the summer of 1942, the position was not acutely uncomfortable although crops had suffered as a result of the drought.

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[1] American Consulate, Tangier, Report #918, July 23, 1942.

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Flour Mills

Much the largest and most important mill in this area is in Larache. There are also mills in the following towns: Ceuta - at least one of medium size and numerous smaller ones; El Ksar el Kebir - about six medium sized mills; Melilla - at least one large plant, equipped with modern machinery and with its own power plant; Tangier - several mills. In addition to these, there are numerous, extremely primitive native mills throughout the country, chiefly operated by water wheels[1].

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[1] ISIS, Northwest Africa, Vol. II, May, 1942.

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GRAINS - TABLE I

Average Area, Production, and Yield of Cereals in Spanish Morocco,[1] 1936-39

	Western Region	Yebala	Gomara	Rif	Eastern Region	Total
Barley:						
Area sown (hectares)......	4,538	4,391	7,647	16,648	39,262	72,486
Production (tons).........	3,106	4,184	6,444	10,685	28,526	53,125
Wheat:						
Area sown (hectares)......	14,152	8,485	2,778	1,318	3,492	30,224
Production (tons).........	9,218	6,797	2,168	902	2,126	21,205
Corn:						
Area sown (hectares)......	435	1,403	1,224	964	145	4,170
Production (tons).........	256	1,030	956	397	116	2,755
Sorghum:						
Area sown (hectares)......	15,014	7,673	1,134	154	10	23,985
Production (tons).........	10,906	8,265	1,082	49	5	20,307

[1] No figures are available on agricultural production in Tangier.

Source: British Geographical Handbook, Morocco, Vol. II, not published.

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GRAINS - TABLE II

Regional Production of Cereals in Spanish Morocco, 1936-39

(Metric tons)

	Western Region	Yebala	Gomara	Rif	Eastern Region	Total
Barley:						
1936	1,070	3,712	5,258	11,509	19,446	39,995
1937	1,671	2,912	4,414	4,602	2,352	15,951
1938	3,196	4,258	7,330	12,249	28,235	55,318
1939	6,386	5,850	8,724	15,098	64,068	100,126
Wheat:						
1936	2,983	2,309	2,376	905	2,146	10,179
1937	9,866	7,451	1,447	351	74	19,189
1938	7,376	6,827	2,122	1,140	2,234	19,699
1939	16,647	10,580	2,724	1,190	4,024	35,165
Corn:						
1936	226	814	924	448	123	2,535
1937	202	1,262	953	317	101	2,835
1938	245	1,020	958	333	123	2,679
1939	319	1,025	1,014	476	115	2,949
Sorghum:						
1936	11,150	5,284	1,085	102	1	17,622
1937	6,994	5,377	1,106	36	......	13,513
1938	8,651	11,047	1,024	37	......	20,759
1939	15,555	11,343	1,108	20	......	28,026

Source: British Geographical Handbook, Morocco, Vol. II, not published.

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GRAINS - TABLE III

Spanish Morocco and Tangier

A. Cereal Imports[1]
(metric tons)

Region	Wheat	Wheat Flour	Barley	Corn
Tangier:				
1936..........	260	13,050	1,190	150
1937..........	120	9,060	180	120
1938..........	120	8,780	80	0
Ceuta:				
1936..........	1,550	7,830	2,570	200
Melilla:				
1936..........	0	7,580	3,380	2,340
Protectorate:				
1936..........	5,090	19,220	7,420	2,730
1937..........	14,120	31,110	20,850	7,930
1938..........	6,410	34,780	3,110	5,040
1939..........	12,290	27,260	2,480	1,050

[1] Exports were nil or of only a negligible amount.

Source: 1936-39: International Institute of Agriculture, Yearbook 1940/41.

B. Protectorate Imports of Wheat, by Kinds
(metric tons)

Kind	1936	1937	1938
Soft....................	4,971	6,321	2,228
Hard....................	120	7,799	4,182

Source: ISIS, May, 1942.

VEGETABLE OILS

Although some olive oil is produced in the country, the table shows that imports are necessary to supplement domestic vegetable oil supplies. The lack of these imports at this time has made cooking oil one of the commodities in which the shortage is the most acute.

Soap Factories

There is no complete information on the number of plants but it is known[1] that there are at least two plants making both soap and candles at Melilla. There is also a plant at Tangier (with a capacity in 1936 of 40 tons of soap a month) but it is believed it has been forced to cease operations as a result of the shortage of vegetable oils, particularly imported soy bean oil.

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[1] ISIS, Northwest Africa, Vol. II, May 1942.

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VEGETABLE OILS - TABLE I

Net Imports of Vegetable Oils
(In metric tons)

Tangier

	Aver. 1930-34	1935	1936	1937	1938	1939	1940
Peanut Oil	171	131	189	330	705		
Linseed Oil	224	434	188	273	21		
Soybean Oil	552	862	661	312	139		
Olive Oil		110	110	50	50		

Spanish Morocco

	Aver. 1930-34	1935	1936	1937	1938	1939	1940
Olive Oil							
Ceuta		1,180		1,910			
Melilla		820		1,110			
Protectorate		1,450		2,430			
Palm & Coconut Oil							
Ceuta		0		0			
Melilla		212		178			

Source: 1930-38 - International Institute of Agriculture, Yearbook, 1940-41.

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FRUITS AND VINES

Vines, olives, figs, and citrus fruits are the most important fruits in Spanish Morocco; they are grown mainly in the central and eastern parts of the country. (Table I). Figs and oranges are common on the plains of the western region. The principal vineyards are in Gomara, Rif, and the Melilla district. Grapes are raised mostly for eating fresh and for drying as raisins. The wine requirements of the non-Mohammedan population are met by imports. (Table III).

Table II shows that for most fruits, domestic supplies must be supplemented by imports. (Oranges are a significant exception in the case of Spanish Morocco. In the years just before the war, this region began to have a net export of this fruit.)

Most of the rich natives have plantations and groves, sometimes of considerable extent, around their houses. Here, in addition to the fruits which enter into commerce, they grow, for their own use, white mulberries, plums, chestnuts, the carob bean, stone pines, walnuts, filberts, peaches, quince, apples, apricots, cherries, pears, and dates. Groves of trees, especially of date palms, are found in the oases in the desert to the south.

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FRUITS - TABLE I

Number of Fruit Trees in Spanish Morocco, By Regions, 1931

Fruit	Total	Western Region	Yebala	Gomara	Rif	Eastern Region
Vines	2,062,998	19,055	175,239	875,437	519,066	394,201
Olives	311,321	47,321	15,675	177,731	22,773	47,821
Oranges	109,756	51,934	39,871	3,559	1,327	13,065
Almonds	72,298	850	7,254	14,888	45,904	3,402
Figs	984,517	136,509	89,022	315,053	247,331	196,602
Pomegranates	88,618	20,746	15,136	16,995	1,812	33,929
Apples	22,223	6,154	8,981	4,971	112	2,005
Pears	24,901	8,951	11,317	816	323	3,494
Plums	37,206	12,389	21,309	1,267	26	2,215

Source: British Geographical Handbook, Morocco, Vol. II, not published.

FRUITS - TABLE II

Net Imports and Exports of Fruits by Kinds
(Metric tons)

	Averages 1930-34	1935	1936	1937	1938
Grapes					
Net imports					
Sp. Morocco	210	90	10	n.a.	n.a.
Tangier ...	240	290	20	40	....
Net Exports					
Tangier ...	...				10
Raisins					
Net Imports					
Sp. Morocco	90	10	30	90	60
Tangier ...	20	10	20	50	20
Oranges					
Net Imports					
Sp. Morocco	190	40	...	...	....
Tangier....	220	160	40	30	10
Net Exports					
Sp. Morocco	...	...	320	470	n.a.
Lemons					
Net Imports					
Sp. Morocco	110	10	20	60	90
Tangier....	110	80	90	90	40
Fresh Apples					
Net Imports					
Tangier....	60	90	130	80	90
Dates					
Net Imports					
Tangier....	310	180	260	220	290
Sp. Morocco	n.a.	380	230	n.a.	n.a.
Bananas					
Net Imports					
Tangier....	140	30	420	370	30

Source: International Institute of Agriculture, *Year-book, 1940/41*

N.A. - not available

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FRUITS TABLE III

Net Imports of Wine
(Metric tons)

	1935	1936
Spanish Morocco:		
Ceuta.......	2,220	2,340
Melilla.....	330	320
Protectorate	3,440	2,730
Tangier...........	780	450

Source : I.S.I.S., *Northwest Africa*, Vol. II, May 1942

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VEGETABLES

Production of peas and beans is particularly important in the western half of the country. This is apparent from Table I which gives the few available statistics on vegetable production by regions in Spanish Morocco. Market gardening has been extended considerably in recent years, particularly around the larger towns, notably Tangier, and is decreasing the dependence of those areas on French Morocco and Spain. Table II gives the most recent available figures on the net import and export position in respect to several important vegetables.

As with other commodities, the war has adversely affected the vegetable supply position of Tangier and Spanish Morocco; production has not been able to keep pace with the increased demand caused by the lack of other foodstuffs. Vegetables of which the domestic output was never enough to cover requirements (like potatoes) have virtually disappeared form the market.

There is one vegetable canning plant at Larache, which packs peas, beans, and pimentos.

VEGETABLES - TABLE I

Production of Vegetables in Spanish Morocco, 1931

(Metric tons)

Crop	Western Region	Yebala	Gomara	Rif
Peas.........	527	208	101	94
Chick peas...	572	115	106	n.a.
Lentils......	10	n.a.	n.a.	57
Beans........	1,285	696	1,675	407
Market garden produce......	n.a.	n.a.	603	144

Source: British Geographical Handbook Series, North Africa, Vol. II not published

N.A. - not available

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VEGETABLES - TABLE II

Net Exports and Imports
(Metric tons)

Potatoes	Average 1930-34	1935	1936	1937	1938	1939
Net Imports -						
Sp. Mor.	14,610	11,870	5,270	2,130	890	2,710
Tangier	1,930	1,960	3,900	1,970	2,820	.....
Dried Beans						
Net Imports -						
Sp. Mor.	1,590	860	1,320	700	370	450
Tangier	120	110	220	140	100	......
Onions						
Net Imports -						
Sp. Mor.	360	80	70	.....	....	.....
Net Exports -						
Tangier	......	......	10	10	.....	.....
Pepper						
Net Imports -						
Sp. Mor.	204	276	131	85	33	32
Tangier	16	15	15	72	100	.....

Source: 1930 - 1939 - International Institute of Agriculture, Yearbook, 1940/41/

MISCELLANEOUS FOODS

Tangier and Spanish Morocco are dependent upon imports for the major part of their sugar and coffee supply and for all their tea. Heavily sugared green tea is an important staple of native diet, and considerable distress has been caused since the war has virtually halted imports. In Spanish Morocco, in the Spring of 1942, the more fertile western lowlands appeared to be adequately supplied with foodstuffs[1] but to the east there were acute shortages.

Import statistics for sugar, coffee, and tea for the most recent years for which these data are available are shown in the table below.

Imports into Spanish Morocco
(Metric tons)

	1936	1937	1938
Refined sugar	18,766	10,978	18,353
Coffee......	n.a.	323	226
Tea(green)..	409	327	305

Imports into Tangier
(Metric tons)

	1936	1937	1938
Refined sugar	2,620	2,090	1,930

Source: I.S.I.S., Northwest Africa, Vol. II. May, 1942.

N.A. - not available

[1] American Consulate Tangier, Report 918, July 1942.

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LIVESTOCK

Livestock is the chief possession of the native, but because of primitive methods, the scarcity of pasture in dry years, and lack of attention to principles of breeding, the quality of the stock is not very good. The most recent available figures on numbers of livestock and transport animals are shown in Table I. The main areas in which livestock raising is undertaken is shown on the map.

The largest sheep flocks are in the Western Region where there are also the most cattle. In the valley of the Oued Loukkos the standard for cattle is higher than elsewhere in Spanish Morocco, partly because European colonists have introduced foreign breeds and better methods of stock breeding. The native cattle are usually very small and are poor milkers. Bullocks are commonly used as draft animals. Goats are common throughout the country, especially in the mountainous districts, especially in the Chiadma and Haba areas. The native variety is a small animal with an average meat yield of 22 to 37 pounds and a low production of milk. The meat yield from the native sheep averages between 33 and 48 pounds. Pigs are raised mainly by European colonists.

Horses, mules, donkeys, camels, and oxen are used as pack animals in Spanish Morocco, while in Tangier, horses. mules and donkeys are the most common. The number of horses apparently is declining and the general impression is that the average animal is not in good condition. On the other hand, mules are increasing. The local breed of donkey is small but hardy and widely used by the natives. Camels are found hardly at all outside of the Eastern Region.

No information is available as to the poultry of this country, but both eggs and live poultry are exported. In 1937, Tangier exported 269,365 lbs. of eggs, and 79,442 lbs. of live poultry.

It can be seen from Table II that small numbers of livestock were exported each year, but meat and animal products were imported. These were probably necessary to supply the urban population (and in pre-war days especially the tourists) with better grades of meat than the local stock supplied. The closing down on imports from French Morocco, especially, has adversely affected the meat situation in the Spanish Zone. Slaughter has declined as natives prefer to keep their cattle rather than to exchange them for money with which they can now buy little in view of the scarcity of consumer goods. As a result, there are three meatless days a week, and what little meat is in the market is sold at very high prices, so that in fact the average family cannot afford to have meat more than once a week perhaps.[1]

There are a number of slaughter houses in towns in Spanish Morocco (Larache, Melilla, Tetuan)as well as one in Tangier[2]. These provide meat for the urban dwellers while the natives particularly the nomadic tribes take care of their own supply.

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[1] American Consulate Tangier, March 3, 1942. "Livestock in the Spanish Zone of Morocco".

[2] British Geographical Handbook, Morrocco, Vol II. Not published

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LIVESTOCK - TABLE I

Numbers of Livestock and Transport Animals in Spanish Morocco, 1931

Animal	Western Region	Yebala	Gomara	Rif	Eastern Region
Sheep......................	201,559	66,618	26,563	39,418	86,784
Goats......................	119,865	155,864	146,438	120,449	102,160
Cattle.....................	88,690	54,148	50,309	31,016	41,689
Pigs.......................	2,500	1,114	167	333	1,058
Horses.....................	8,731	3,818	502	608	2,262
Mules......................	3,223	2,307	2,134	4,293	4,944
Donkeys....................	8,928	7,028	2,861	3,736	15,486
Camels.....................	38	158	....	....	1,316

Source: British Geographical Handbook, *Morocco*, Vol. II, not published.

LIVESTOCK - TABLE II

Net Imports (+) and Exports (-) of Meat and Live Animals

A. Tangier

	1935	1936	1937	1938	1939
Cattle (thousand head)..	-0.3	-1.1	-0.7	-0.6	....
Pigs (thousand head)....	-0.3	-0.2	0.0	-0.1	....
Beef and other meats (metric tons)........	+ 20	+ 20	0	+ 10	....
Ham, Bacon and salt fat pork (metric tons)...	+ 60	+ 70	+ 60	+ 30	....

B. Spanish Morocco

	1935	1936	1937	1938	1939
Cattle (thousand head)..					
Ceuta.................	+1.3	+0.2			
Melilla...............	-6.5	-6.7			
Protectorate..........	-8.7	-12.3	-8.6	-5.6	-3.2
Pigs (thousand head)					
Ceuta.................	0.0	+0.1			
Melilla...............	-1.8	-1.4			
Protectorate..........	-3.9	-2.6	-0.9	-0.5	-0.2
Pork (metric tons)					
Ceuta.................	+280	+240			
Melilla...............	+ 30	+ 20			
Protectorate..........	+210	+150	+170	+110	+110
Ham, bacon and fat salt pork (metric tons).					
Ceuta.............	+ 40	+ 40			
Melilla...........	+ 30	0			
Protectorate......	+ 10	+ 60	+ 80	+ 40	+ 30

Source: International Institute of Agriculture, Yearbook 1940/41.

Note: Data for Ceuta and Melilla are not available after 1936, nor for Tangier after 1938.

FISHERIES

Sea food is abundant off the shores of Spanish Morocco and Tangier. There is a wide variety of mollusks along the shore, including clams, cockles, mussels, squid, and cuttlefish. Among the crustaceans, some lobsters are caught, and there are crabs in the bays and near the mouths of rivers especially at Beni Hosmar, ~~and~~ west of Beni Hassan, and south of Tangaia.[1]

Sharks and dogfish are to be found. The edible fishes which may be caught at varying distances from shore include anchovies, sardines, horse mackerel, ox-eyed cackerel (a sort of sea bream), porgies, sea bass, small flounders, hake, cat heads, and eels, as well as a number that are peculiar to the Mediterranean. Tunny fish are caught in considerable numbers.

Despite this abundance, fish have been scarce in Spanish Morocco in the past year, as the fishermen lacked fuel for their boats. Once supplied with gas oil, however, the fishing boats would be able to tap a rich source of food.

In both Tangier and the Spanish Zone there are considerable numbers of canneries, all of which are dependent upon imported tinplate. Among the more important canneries, all handling both tunny and sardines, are those at Arzila, Ceuta, Larache, three at Melilla, and three at Tangier.[1]

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[1] Commission Historica de las Campanas de Marruecos: Geografia de Marruecos, Vol. 1., 1935.

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[1] ISIS, Northwest Africa, Vol. II, May, 1942.

FORESTS

The types of trees found in Spanish Morocco vary according to the topography. In general it may be said that there are five forestry zones. The first of these, lies between the Yebala Mountains and the parallel of Larache; here the trees resemble those to be found in metropolitan Spain. The second, where the trees are mainly cedars, runs along the Atlas Mountains from Tagsut to Yebel Kelty. The third, lies along the litoral; here there are dunes with low growing shrubs, and meadows in the lower parts while on the higher ground there is holly, the mastio tree, oaks, and juniper. The fourth region, lies in the lower region of the Moulouya where the vegetation is of drought resistant types. The fourth region, south of Yebala, has hills covered with cedars, cork oak, and scrub and in the desert oases of the southernmost part, palms.

The forests of this country have suffered through the carelessness of the natives in exploiting them, and because of the constant wars. Properly managed, they could be a fairly valuable resource. Among the most important products is cork. The cork oaks are particularly abundant in the Sahel, Jolot,

← Beni Ider, Beni Aros, Sumata, Ahl Serif, Beni Issef, el Ajmas, Beni Ahamed, Beni Erzin, M'tina, Beni Esmih, Beni Jaled, and Ketama. In general, these areas lie on the southern slopes of the Rif, especially between Zauen and El Ksar el Kebir. Cork oaks, mixed with other trees, are common near Djebel Ketama and north of Djebel Tidiguin. If the cork is to flourish in a mixed forest, it can do so only if the brush and scrub has been cut away for charcoal burning. This has been done on a small scale near Ceuta. In the neighborhood of villages the cork oak has usually suffered severly from the reckless lopping of its branches for firewood.

The natives do not use cork much except for the manufacture of a few domestic articles; a center of production is at Beni Tuzin. The chief native interest in forests as a source of firewood and charcoal although some acorns are used as food or animal feed.

Ash trees are found mainly in Yebala Peninsula and the Western Rif, oaks (encina) in Yebala and Gomara, a second variety of oak (roble) south of Tangaia, and cedars in the high Western Rif and in Tisuka, Magot, and Tazot. (See the map in this volume.)

Saw Mills and Lumber Yards

There is a well-equipped saw mill in Tangier, and a large lumber yard with another saw mill; the latter, however, is of small capacity. It has been reported that it was proposed to construct a saw mill in Tetuan which would use timber from Ketama in the Rif, but there has been no information as to whether or not it has been completed.[1]

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[1] ISIS, Northwest Africa, May 1942. Vol. II.

TEXTILES

Apart from wool, flax, and palm fibre, Spanish Morocco and Tangier do not have any domestic supplies of textile raw materials. There have been suggestions that cotton might be grown in the Oued Loukkos area but these have never been pursued beyond the experimental stage. No statistics are available in regard to wool production, but in all likelihood little of the clip enters into the trade, the natives keeping it for their own use. Palm fibre (crin vegetal) is not suitable for the manufacture of clothing textiles unless mixed with other fibres. Since Spanish Morocco is not equipped to do this, the supplies of palm fibre are of little use in relieving the present situation. In 1938, the Spanish Zone exported 1,878 tons of crin vegetal, and Tangier, 623 tons.[1]

Clothing supplies are reported[2] to be scarce in Spanish Morocco with the people particularly badly clothed in the Galiya and Beni Bu Jehyi. Cloth, and even thread, is very hard to find; what little there is has been smuggled in from Portugal and pieces are out of reach of the average income. During the first

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[1] American Consulate Tangier, November 26, 1941. "Production of Crin Vegetal in Morocco."

[2] American Consulate Tangier, July, 1942, Report #918.

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nine months of 1942, the United States has sent only 31,000 yards of cotton goods to Spanish Morocco (compared to 27,000,000 yards to French North Africa in the same period.)

SECRET

INDUSTRIAL RESOURCES

Mineral Resources
Oil Position
Industry

Prepared by
Industrial Resources Section
Economics Division
Office of Strategic Services

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GENERAL

Because of its poverty of natural resources and its relatively sizeable population, Spanish Morocco has always been an economic liability to Spain. Since the war, trade with other countries has substantially declined and dependence upon Spain has increased in proportion. At the present time, Spanish Morocco's only important contributions are high grade iron ore, and the servicing of the large military garrisons.

Before the war stocks of manufactured goods in Spanish Morocco were for the most part of German origin. Trucks, automobiles, typewriters, electrical fixtures, household kitchen utensils, photographic material, etc., were imported under a barter arrangement worked out by a German syndicate called "Hisma." This trade ceased with the outbreak of war. Manufactured articles are now imported on a much smaller scale from Spain. Foodstuffs come from both Spain and French Morocco. All these items, however, have of late been arriving only irregularly and in insufficient quantities. The result has been high prices, profiteering, attempted rationing, and a flourishing black market. Prices have risen so drastically that the mass of the native population is not able to buy even what the rations allow. The entire economic situation is one of tension and growing stringency.

MINERAL RESOURCES

A. General

Iron ore is the only mineral produced in significant quantities. It is by far the most important natural resource of any kind in Spanish Morocco and serves as the principal item in its foreign trade. There are in addition small scale workings of lead, manganese, antimony, graphite, copper, and limestone. Unexploited deposits of zinc, chromite, platinum, nickel, mercury, asbestos, and mica are also reported.

Practically the entire mineral output of Spanish Morocco is destined for export. Since the first World War, Germany, Holland, and England have been the principal customers.

B. Iron Ore

The bulk of the iron ore and the highest grade comes from the Minas del Rif near Melilla. Before the war the principal importer of ore was Germany; only small quantities were shipped to the United States, France, and Italy. Since the outbreak of the war, England has become the principal country of destination, having imported 431,000 tons in 1941 and 245,000 tons in the first six months of 1942. In the course of the last year, Spain, too, has increased her imports very substantially, having received 83,000 tons in 1941 and 71,000 tons in the first half of 1942.[1]

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[1] English and Spanish import figures 1941-42 refer only to ore from Minas del Rif.

At present the Spanish Moroccan iron ore mines could produce nearly two million tons a year, 80 per cent of which could be obtained from the Minas del Rif deposits on Monte Ouiksan.

Although the highest output reached by the Minas del Rif was 1,153,000 tons (in 1937), its present rated capacity is 1,600,000 tons a year. The mine has not been operating at capacity, especially since the war, partly on account of shortages of oil, greases, and spares. (Apparently this condition has recently been improved by shipments from the United Kingdom). At times when shipping has been interrupted, large stocks of ore have accumulated.

The Cia Espanola de Minas del Rif has its own meter gauge railway to Melilla and its own quay there. The following is a description of the mines on Monte Ouiksan (13 miles southwest of Melilla).

> "Mining is open cast; the ore is drilled in benches cut into the hillside and blasted out. Electric shovels on caterpillar tractors load the ore into small self-dumping trucks; these are drawn by steam locomotives (0.75 meter gauge) to a double-track incline, which takes the ore down to the main floor of the mine at about 320 meters. The principal mine buildings are situated on this level; they comprise ore-crushing and dressing plants, kilns for calcining pyritous ore, storage bins, air-compressor and a central power station. The railway from St. Jean des Mines (San Juan de las Minas) to the port of Melilla is 15 miles long and is owned and operated by the Rif company. Steel ore wagons of 22 tons capacity are used, and steam locomotives. The number of rolling stock is not known, but from the scale of operations it is clear that several locomotives and at least 100 to

> 200 trucks must be in use. The company has stations and sidings at St. Jean des Mines, Nador, and Melilla; there is at Melilla a 'Permutit' water-softening plant for the locomotive water."[1]

The grade of ore in the Minas del Rif is, iron, 63.71 per cent; silicon, 4.48 per cent; sulphur 0.18 per cent; phosphorus 0.027 per cent.

Pertinent facts about the remaining iron ore mines are included in Table I.

C. Other Minerals

Minerals other than iron ore are mined in Spanish Morocco sporadically and on a small scale.

Table II gives the location of mines, output when known, and location of unexploited veins.

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1 I.S.I.S. Report on Northwest Africa, May 1942, Part 5

Due to its large size, the following document has been filmed in segments. The order of the segments is as follows: left to right, top to bottom.

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TABLE I

IRON ORE MINES OF SPANISH MOROCCO

Mining Company	Location of Mine	Fe Content (Percent)	Estimated Capacity	Average Annual Output 1936-38	Output Since 1939	Plant Facilities	Remarks
			(In thousands of metric tons)				
TOTAL				1,272	1939-1,038 1/ 1940- 391 1/		
Cia Espanola de Minas del Rif	Monte, Ouiksan	63	1,600	1,046	1941- 440 2/ 1942- 466est. 2/	See Text	See Text
S.A.Minera Setolazar San Miguel	Setòlazar or Navarette	52	200	146	Unknown	Served by .60 m. gauge railway to ore quay at Melilla	Ore has high sulphur content and is roasted at the mine.
S.A.Minera Cabarga-	Monte Afra	46	0	16	"	Do.	Reported exhausted and closed down.
Cia Alicantina	La Alicantina, south of Afra	46	unknown	13	"	Do.	
Cia Minera Merroqui	La Andaluza	48	10	10	"	Do.	Ore has high sulphur and phosphorus content.
Minas de Hierro los Polis	Los Polis, south of Melilla	unknown	12	8	"	Do.	Ore has low phosphorus content. Mine reported closed in 1941.
Cia Hispano Africana	Afrau, 30 miles west of Melilla on the coast	48	50	31	"	Has its own loading pier.	Low phosphorus content ore. Reported to be 37,000 tons on hand July 1, 1942. Latest report (Sept.) states mine not working due to lack of funds.

(Source, except where indicated, I.S.I.S. May 1942)

1/ M.I.D. Attache in Tangier. Report on Mining in the Spanish protectorate of Morocco, Jan. 3, 1942. 2/ R.S.Crocker, British Vice Consul at M Melilla, Report on Output of Minas del Rif, enclosed with consular report, Sept.17,1942, Tangier, 1942 figure estimated on basis of actual production 1st half of year.

TABLE II

NON-FERROUS METAL RESOURCES OF SPANISH MOROCCO

Mineral	Location of Mine	Percent Annual Output (Metric Tons)	Location of Unexploited Veins	Remarks
Antimony	2 mines between Ceuta and Tetuan	250 (ore)[1]		Output has been going to Germany.
Manganese		Present - unknown[2] 1937-300 (metal content) 1938-100 " "	Deposits reported on almost all mountain ridges in eastern part of Spanish Morocco[1]	Apparently, more being produced at present.
Lead	Near Villa Sanjurjo	1,000 (ore)[1]	Utah de Ajarbuch and Bab-Tazza, both at Beni Selman[3]	Unexploited regions are among concessions belonging to Duke of Tovar.
Graphite		Unknown	Targa & Isquien, both at Beni-Buz-Ra[3]	Do.
Copper	Ceuta[1]	Unknown	5 veins at Beni-Buz-Ra at coast of Izlan[3] At Beni-Said (Guarrak) 2 important veins at Guarrak and Agrod. There are 3 lesser veins at Holika-del-Dhuch and ravine of El Ayin-de-Acriyalo. Also at Tiguienxiuen (Emsa).[3]	Do.
Limestone	On railway line south of Melilla[4]	Unknown	At Beni-Buz-Ra[3]	Do.
Phosphate	Tangier-in mountainous sections near fairly good roads[5].	Unknown		Operated on small scale with hand labor[5].
Zinc		None now being worked[1]		
Chromite		Never exploited[1]	Beni-Buz-Ra on the coast[3]	Claimed to be high-grade ore. Unexploited regions are among concessions belonging to the Duke of Tovar[1].
Platinum		Unexploited	Beni-Buz-Ra[3]	Do.
Others:				
Mica & Asbestos		Unexploited	In area bound by Cuad Lau and Puerto Capaz[6]	

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FOOTNOTES TO TABLE II

1. Consular report, Tangier, Morocco - Sept. 17, 1942, Certain Potential Strategic Minerals and Other Products in Spanish Morocco.
2. Statistical Yearbook, League of Nations, 1939-1940.
3. Survey of mining concessions held by Duke of Tovar, 1929 contained in Consular Report from Tangier, September 23, 1942.
4. Photointelligence Report, A-2, Report No. 9.
5. Photointelligence Report, A-2, Report No. 13.
6. Department of Overseas Trade, Report on Economic and Commercial Conditions in Morocco, May, 1939.

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THE OIL POSITION OF SPANISH MOROCCO AND TANGIER

Present civilian and military oil stocks in Spanish Morocco and Tangier are too low to sustain any large scale military activity. Domestic production is insignificant and no imports are in sight before the end of the year. Whatever imports may reach Spanish North Africa depend exclusively on shipments allowed by American authorities. Stocks in Spain or in Tenerife are too small to permit shipments of any size to Spanish North Africa. The United Nations are in a position to block importations from the Axis.

Essential civilian and industrial oil requirements of Spanish Morocco and Tangier have been roughly estimated at about 24,000 tons a year, composed as follows:

PETROLEUM
ESTIMATED ESSENTIAL CIVILIAN AND INDUSTRIAL REQUIREMENTS
(Metric Tons)

	Spanish Morocco	Tangier	Total
Gasoline	7,100	1,240	8,340
Kerosene	3,360	960	4,320
Lubricants	---	---	840
Heavy Oils	8,500	2,100	10,600
Total	18,960	4,300	24,100

Large deposits of oil shale (reserves estimated at 100 million tons of shale) have been found near Tangier. One pilot distillation plant was scheduled to start operations by the end of 1942. Its planned annual capacity is 2,600 tons of crude oil with an expected yield of 520 tons of gasoline, 910 tons of gas oil, and 910 tons of fuel oil. Once the pilot plant has begun operation, two additional plants are to be constructed with a planned annual crude oil output of 16,250 tons yielding 3,250 tons of gasoline, 5,650 tons of gas oil and 5,650 tons of fuel oil. But in view of the difficulties encountered even in obtaining the machinery for the experimental plant, it is most doubtful whether construction of these two plants has been started or whether any production from shale has yet been obtained.

Thus Spanish North Africa remains dependent on imports of crude oil from the Western Hemisphere. These are first refined in the Tenerife (Canary Islands) plant of the company "Cepsa" and thence shipped to Spanish North Africa.

Imports in 1941 were sufficient to cover total requirements, though increasing supply difficulties were encountered in the second half of the year. Oil imports into Spanish North Africa, estimated on the basis of statistics for the period January -- November

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1941 as supplied by the company "Cepsa" were as follows:

ESTIMATED MINERAL OIL IMPORTS OF SPANISH MOROCCO AND TANGIER IN 1941

(Metric tons)

	Spanish Morocco	Tangier	Total
Gasoline	12,500	1,000	13,500
Kerosene	2,700	1,100	3,800
Lubricants	---	---	840
Gas Oil	7,700	110	7,810
Fuel Oil	1,400	---	1,400
Total	24,300	2,210	27,350

In 1942 exports to Spanish North Africa were rigidly controlled by the American authorities and the quantities actually shipped fell far below essential demand. Domestic consumption had to be reduced by imposing increasingly severe restrictions. In October, 1941, weekend motor traffic was prohibited. Since the end of December 1941 no private cars of over 25 h.p. were allowed on the roads and bus and taxi services were reduced. At the beginning of 1942, gasoline rations for motor cars of 15 h.p. and less amounted to 60 liters per month and to 90 liters for heavier units. In March rations were cut to 36 and 45 liters respectively and in May to 12 and 15 liters.

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Since June, 1942 motor fuel has been supplied only to officials, doctors, and to a few authorized buses and taxis. Whatever road transport is left is largely dependent on generator fuels - but lack of suitable solid fuels hampers conversion to this type of propulsion.

In spite of all efforts to reduce consumption, inroads had to be made into the small existing stocks. At present only very small reserves are left in the country.

CIVILIAN MINERAL OIL STOCKS IN SPANISH MOROCCO AND TANGIER
(Metric Tons)

	November 1942	May 1942	November 1941
Gasoline	379	1,687	7,316
Kerosene	473	205	622
Lubricants	50	18	--1/
Gas Oil	590	)552	400
Fuel Oil	895	)	--1/
Total	2,385	2,462	8,338

1/ No data.

To supplement civilian supplies some withdrawals were also made from military stocks, which in May 1942 amounted to 4,700 tons.

MILITARY MINERAL OIL STOCKS IN SPANISH MOROCCO AS OF MAY 1942

(Metric tons)

Aviation Gasoline	Motor Gasoline	Kerosene	Lubricants	TOTAL	Of Total - at			
					Melilla	Ceuta	Tetuan	Oth
126	4,551	8	31	4,716	2,161	983	890	682

By November 1942 military stocks at Melilla had dropped to 460 tons. Part of the stocks, moreover, had deteriorated through long storage in drums. This may be especially important in the case of aviation gasoline. Leakage has caused additional losses. It may be mentioned that available stocks could not cover military requirements for the army of over 100,000 men for more than one month at most.

New supplies since November have been very small and no appreciable relief is in sight before the end of December. Two tankers with 16,000 tons of crude oil will arrive in Tenerife early in December from the Western Hemisphere. By the end of December some refined products from these two cargos may reach Spanish North Africa. In the meantime, reserves in Tenerife and Spain proper are at too low a level to allow larger shipments to Morocco and Tangier.

NOTES ON SOURCES

Information on essential petroleum requirements and stocks from B.E.W.

Consular Report from Tangier, May 7, 1942
Military and Civilian Stocks of Petroleum Products

Consular Report from Tangier, May 8, 1942
Erection of a Bituminous Schist Mill at Tangier

O.S.S. 10516
Gasoline Requirements for Spanish Army in Morocco

O.S.S. - Strategic Survey of Morocco - Volume II
Economic Resources of Morocco

I.S.I.S. - Report on Morocco, May 1942

INDUSTRY

Industry exclusive of mining in Tangier and Spanish Morocco is on a small scale and of relatively little importance. Not only must the area import such manufactured goods as textiles, machinery, and refined petroleum, but it is even dependent upon the outside for much of its foodstuffs. In Tangier the tourist trade was formerly the principal industry and its value was in excess of all visible exports. Much of the output of native crafts was dependent on this trade. Even before the outbreak of war, however, the trade was adversely affected by the Abyssinian crisis and the Spanish Civil War.

The most important of such industrial activity as exists is centered in Melilla, where there are machine-shops and engineering works. The three principal works are capable of doing jobs of some importance. The Cia. Espanola de Minas del Rif has up-to-date machine shops. They repair their own tractors, excavators, locomotives, etc. In Barrio Industrial, south of the mouth of the Rio de Oro, there is an establishment with about a dozen lathes, smelting and casting department, and the only electric welding facilities in Spanish Morocco. These works recently did a good repair job on an Allied steamer. In addition, there are municipal workshops with a portable air-compressor and some pneumatic tools. There are small scale machine shops at Ceuta, Larache, Nador, Tangier, and Tetuan. Works in Ceuta and Tetuan are reported to have made munitions during the Spanish Civil War. 1/ and 2/

Asphalt

One small asphalt plant in Tangier, located on the north east mole of its inner harbour, northwest of the Shell Oil storage installation. Imported raw materials are used.[2]

Bricks

There are two brick works in Tangier, one about three miles east of the town, and one about three miles southeast; the latter is now shut down. In addition there is one brick-works in Tetuan close to the Tangier Road.[2]

Cement

The only known plant is near Melilla. It draws its raw material from a quarry two miles south of the city adjacent to the Nador road.[2]

Miscellaneous

On a modest scale pottery, candles, soap, and matches are also manufactured. (See section on Agriculture for information on flour mills, food canning, and vegetable fibre manufacturing.)

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1. Photo-intelligence, A-2, Report No. 14.
2. I.S.I.S. - Report on Northwest Africa May 1942 - Part 5

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LABOR

Population
Labor Supply
Housing

Prepared by
Labor Supply Section
Economics Division
Office of Strategic Services

November 20, 1942

(6211)

SUMMARY

Of an estimated total population of approximately 945,000, there are in Spanish Morocco only about 75,000 persons of working age living in urban centers over 5,000 population who might be available for special projects. Of this number approximately 40,000 are Spaniards and Europeans and 35,000 are native Spanish Moroccans. Of this number, also, perhaps only 60,000 are employed in enterprises which might make them readily available. The remainder are refugees and retired.

With the exception of iron mining, Spanish Morocco has no industries occupying any substantial number of workers. It is unlikely, therefore, that a mass mobilization of a large number of workers would be easily accomplishe

The country is dependent upon Spain for its food. Since she began developing the backlands in 1927, Spain has pursued a policy of economic nationalism and Spanish Morocco thus obtains little food from its natural source, French Morocco. Instead, whatever food deficits have to met by imports come from Spain. Because of this lack of self-sufficiency, the population is susceptible to the usual economic inducements and this will facilitate recruitment of a labor force. Also, it will be possible to recruit workers from the Moroccan industries without dislocating any economically necessary production. Thus, the number of workers forthcoming will be dependent on the total number of workers in industries rather than on the number which can be spared from industry without dislocating the native economy.

Native labor will probably not be forthcoming in any considerable force. The many single proprietors, who are in varying degrees controlled by native leaders are inaccessable to the labor market. Furthermore, due to the absence of large-scale European-style agricultural enterprises, there is no considerable pool of agricultural laborers.

POPULATION

Spanish Morocco is composed of three differentiated areas, which among them have an estimated population of 944,917.

The portion known as Spanish Morocco proper has an estimated population of 719,553. Of this number approximately 127,000 live in the seven cities having a population of 5,000 or over. Four of these cities have a population of approximately 5,000; the remaining three have between 20,000 and 50,000 each. Approximately 34,000 of the population in cities are Spanish and European.

The Presidios are economically part of Territorial Spain and are estimated to have apopulation of 124,233 of which approximately 112,000 live in cites of 5,000 or over. The entire city population is divided between Ceuta (about 50,000 inhabitants) and Melilla (about 62,000 inhabitants). Mellia is the center of both an agricultural and a small scale industrial economy. The Spanish Moroccan iron mines are located nearby. These cities and the small territories surrounding them have been in Spanish possession for over 400 years and their population is almost entirely Spanish and highly urban. A few French and Jews are known to be among them.

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The International Zone of Tangier has a total estimated population of 101,131 to which the City of Tangier contributes about 79,000. Of this number approximately 14,500 are Spanish and 5,660 European.

POPULATION SPANISH MOROCCO
(Estimated)

	Population	European	Spanish
Spanish Mor. proper	719,553		33,900
Arzila	5,300		
Xauen	5,800		
El Ksar el Kebir	30,700		
Larache	21,600		
Nador	7,400		
Tetuan	50,000		
Villa Sanjurjo	6,100		
Presidios	124,233		110,000
Ceuta	50,300		
Melilla	62,000		
Tangier Zone	101,131	5,660	14,500
Tangier	79,000		
Total Spanish Morocco	944,917		

LABOR

The demand for labor in Spanish Morocco is limited by the Colony's dependence on Spain for food and manufactures. The estimated population of working age in cities is 75,000 of which approximately 40,000 are Spaniards and Europeans.

The skilled workmen of the country are primarily Spaniards and Europeans and they are widely distributed among many small industries. The only industry of any size or importance is iron ore mining which has been estimated to employ about 5,000 workers. The service industries and various small enterprises, such as slaughtering, soda water, distilleries, flour mills, matches tobacco, transport, vegetable fibre (usually 1 man establishments) oil, whaling, fishing and canning occupy the remainder. Native workers living in cities (about 35,000) are largely unskilled.

Wages vary widely between areas and between European and native workers. Europeans in the urban and semi-urban areas doing skilled work can be expected to deman the highest wages and in fact, Europeans doing any kind of work receive about 35 per cent to 50 per cent more that native workers, skilled or unskilled.

The standard monetary unit in the labor markets of all three parts of Spanish Morocco is the peseta, although the Moroccan franc (valued at 14 pesetas to 100 Moroccan francs) was formerly standard in Tangier.

The following tables estimate (in pesetas per 8 hour day) the current wage rate levels in Spanish Morocco and Tangier:

	Tangier - 1939 (Pesetas)		Spanish Morocco - 193 (Pesetas)	
	Native	Euro.	Native	Euro.
Common Labor	10 - 12	-----	5 - 6	------
Carpenters	20 - 25	40 -50	10 - 12	15 - 25
Fitters	--------	50	-------	12
Electricians	--------	50	-------	12
Truck Drivers	20 - 25	35 - 50	7 - 10	12 - 15

Mellila - 1942

Unskilled	8.5	per day
Skilled	10 - 12.5	per day
Masters	15 - 20	per day
Specialist	25 - 35	per day

It can be expected that labor battalions composed of prisoners taken by the Franco army during the Spanish Civil War will be encountered. Reports indicated that several months ago there were about 19 such battalions of 500 men each working on construction of fortifications and roads.

Very little of the agriculture in Spanish Morocco is organized on the European style. There are three main agricultural colonies, none of them of any considerable size: Villa d'Alhucemas, where farmers from Valencia, Spain have settled on about 20,000 acres of good irrigable land; the Garet, near Melilla, where the Compania Colonisadora has established a number of colonists on some small holdings and the plains around Larache where the Compania Agricola has operated on the same small scale for about 15 years.

The larger farms in these regions, which are almost all adjacent to urban areas, use small gangs of day laborers which would be available for special projects.

The numbers available, however, are probably extremely limited since a great proportion of agriculture in Spanish Morocco is carried on by single native proprietor in contrast to French Morocco where ther is a high degree of European style agriculture and thus a large demand for native agricultural labor. Spanish Moroccan agriculturists are principally single proprietors who employ none but their family member.

Some measure of the small size of the organized agricultural labor market of the country is shown by the fact that only 385,000 acres, or 7 per cent of the area of Spanish Morocco, is given to organized farming and that the remainder of the non-urban land is occupied by single tribal members who are independent producers.

Thus a proportionately small sector of the non-urban population would be available for labor for any special project.

HOUSING

The population of the backlands of Spanish Morocco is more sedentary than that of French Morocco. Some of the inhabitants may migrate to neighboring districts to work in the harvest, but return to their home districts when the work is finished. Thus, the dwelling units are rough, permanent structures only adequate for family needs. Visito travelling singly or in small numbers through the backlands might be housed in some community building for a night or two, but no housing facilities for large numbers of persons can be expected. This is true also in urban centers, for it is reported that there is shortage of private dwellings in cities and that often several families occupy the same dwelling unit.

Facilities for housing large numbers of people in cities are not to be found even through possible utilization of public buildings and hotels. Barracks, forts, camps at present are no doubt utilized to capacity. None of the cities is of sufficient size to boast hotels larger than 300 - 400 rooms; and that only a few of such sixe exist is shown by the following table.

HOTELS IN CITIES OVER 5,000 POPULATION

Arzila (5,300)	Spanish Morocco	1	small hotel
Xauen (5,800)	" "	1	small hotel
El Ksar el Kebir (30,700)	" "	1	small hotel, housin approximately 100
Larache (21,600)	" "	4	hotels, 1 large 300-400, remainder pensions
Nador (7,400)	" "		No information
Tetuan (50,000)	" "	1	large (about 400) excellent hotel About seven small many pensions.
Villa Sanjurjo (6100)	" "	1	pension
Ceuta (50,300)	Presidios	1	large (300-400) 3 smaller hotels.
Melilla (76,900)	"	2	large (about 300) many small pensions
Tangier (50,000)	Tangier	1	large (400) excelle hotel. Innumerable small hotels and pensions near nativ quarters in south o town

PUBLIC BUILDINGS IN CITIES OVER 5,000

Town	Theatres	Barracks Forts, Camps	Schools
Arzila	----	2	2
Xauen	1	2	2
El Ksar el Kebir	----	2	3
Larache	----	4 plus	4
Nador	----	2	1
Tetuan	3 plus	10	4 plus
Villa Sanjurjo	1	Several	------
Ceuta	Several	9	Several
Melilla	3 plus	8	Several
Tangier	Several	2	12 plus

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